

# Employee Post-Travel Disclosure of Travel Expenses

Date/Time Stamp:

**Post-Travel Filing Instructions:** Complete this form within 30 days of returning from travel. Submit all forms to the Office of Public Records in 232 Hart Building.

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In compliance with Rule 35.2(a) and (c), I make the following disclosures with respect to travel expenses that have been or will be reimbursed/paid for me. I also certify that I have attached:

- ☒ The **original** *Employee Pre-Travel Authorization* (Form RE-1), **AND**  
☒ A **copy** of the *Private Sponsor Travel Certification Form* with all attachments (itinerary, invitee list, etc.)

Postsecondary National Policy Institute (PNPI)

Private Sponsor(s) (list all):

Travel date(s): April 19-20, 2017

Name of accompanying family member (if any): N/A

Relationship to Traveler: ☐ Spouse ☐ Child

IF THE COST OF LODGING DID NOT INCREASE DUE TO THE ACCOMPANYING SPOUSE OR DEPENDENT CHILD, ONLY INCLUDE LODGING COSTS IN EMPLOYEE EXPENSES. (Attach additional pages if necessary.)

## Expenses for Employee:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
<input type="checkbox"/> Good Faith Estimate	\$60.14	\$94	\$79	N/A
<input checked="" type="checkbox"/> Actual Amount				

## Expenses for Accompanying Spouse or Dependent Child (if applicable):

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
<input type="checkbox"/> Good Faith Estimate	N/A	N/A	N/A	N/A
<input type="checkbox"/> Actual Amount				

Provide a description of all meetings and events attended. See Senate Rule 35.2(c)(6). (Attach additional pages if necessary.): Attended a seminar on federal postsecondary data. See attached agenda for additional information.

5/17/17  
(Date)

Joshua Delaney  
(Printed name of traveler)

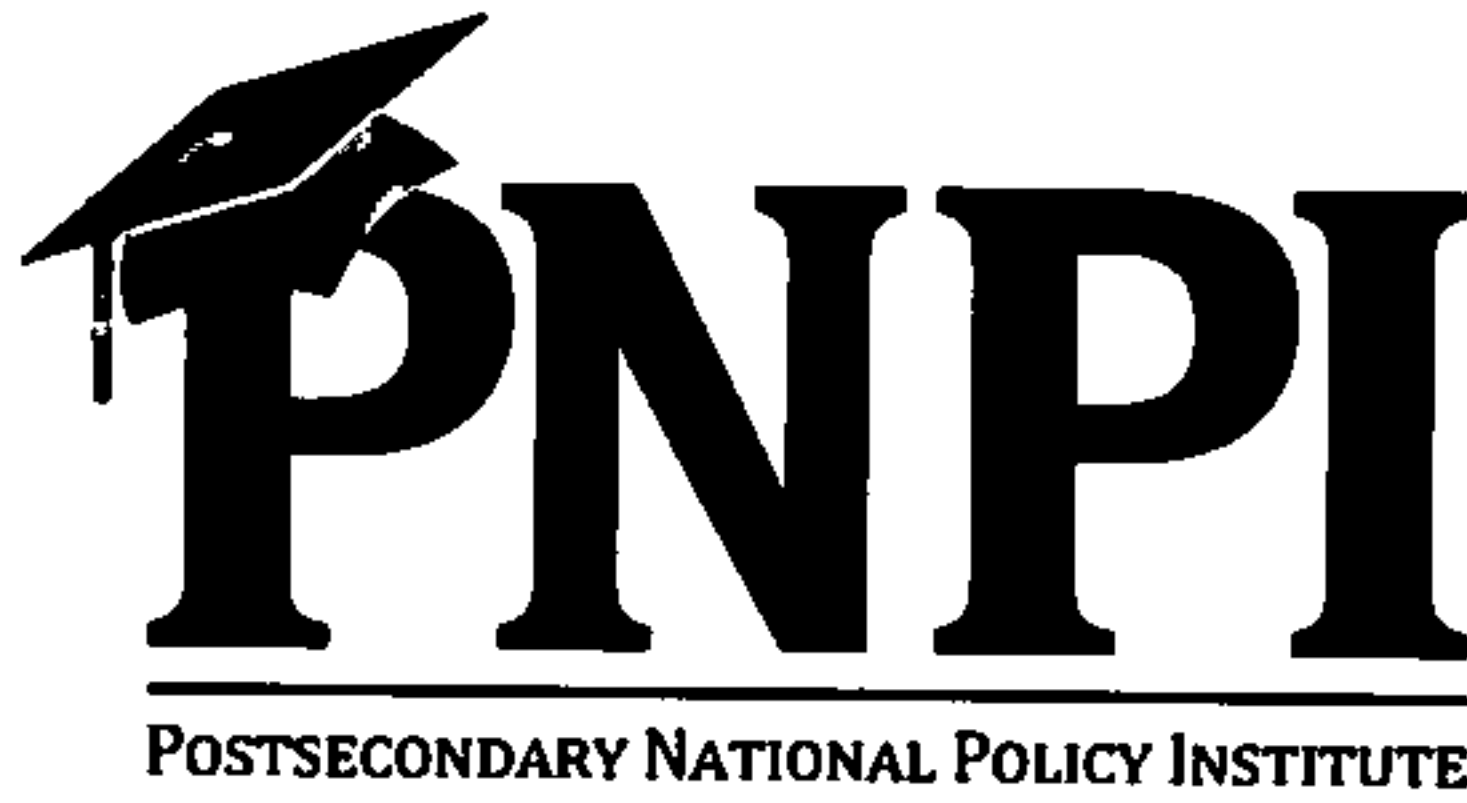
*J. Delaney*  
(Signature of traveler)

TO BE COMPLETED BY SUPERVISING MEMBER/OFFICER:

I have made a determination that the expenses set out above in connections with travel described in the *Employee Pre-Travel Authorization* form, are necessary transportation, lodging, and related expenses as defined in Rule 35.

5/19/17  
(Date)

*E. Delaney*  
(Signature of Supervising Senator/Officer)



## ***Federal Postsecondary Data Primer***

**Wednesday, April 19 - Thursday, April 20**

**Airlie Conference Center**

**Warrenton, VA**

## SEMINAR GOALS

**Introduce staff to, and extend their knowledge of, the postsecondary data sets housed and maintained at the U.S. Department of Education.**

**Introduce staff to, and extend their knowledge of, postsecondary data sets housed and maintained outside of the U.S. Department of Education.**

Deepen staff understanding of federal data privacy and security laws, particularly as it relates to student level data.

**Introduce staff to data linkages across federal agencies.**

Lead staff through a data training exercise meant to increase their ability to access and analyze postsecondary data.

# AGENDA

**Wednesday, April 19**

**10:00AM-10:30AM**

## Arrive at Airlie Conference Center

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**10:30AM-12:00PM**

**Introduction to Federal Postsecondary Data Sets**

**Speakers:**

*MaryEllen McGuire, President, Postsecondary National Policy Institute (PNPI)*

*Mamie Voight, Vice President of Policy Research, Institute for Higher Education Policy (IHEP)*

*Jason Delisle, Resident Fellow, American Enterprise Institute (AEI)*

**Questions for Discussion:**

What are the primary postsecondary data sets housed at the U.S. Department of Education? What data does each set contain? What are the data currently used for?

What data are currently missing?

What data exist on student loans, the student loan portfolio and student loan repayment? What data are missing on student loans, the student loan portfolio and student loan repayment?

What are the key metrics in and across the federal education databases?

**12:00PM-1:15PM**

**Working Lunch with Experts**

*Lunch will provide an opportunity for staff to ask our data panelists additional questions.*

**1:15PM-1:30PM**

**Break**

**1:30PM-2:45PM**

**Other Postsecondary Data Sets**

**Speakers:**

*Jennifer Engle, Senior Program Officer, The Bill & Melinda Gates Foundation*

*Amy Laitinen, Director for Higher Education, New America*

**Discussion Questions:**

What postsecondary data sets exist outside of the U.S. Department of Education?

What data do these sets contain? How different are their metrics from those used at ED?

Why are outside data systems necessary?

What are the shortcomings of these data sets?

Do outside data sets differ from the federal data sets, complement the federal data sets or supplement the federal data sets?

**2:45PM-3:00PM**

**Break**



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**10:45AM-10:55AM    Break**

**10:55AM-12:15PM    Linkages Across Federal Data Systems**

**Speakers:**

*David Bergeron, Senior Fellow, Center for American Progress (CAP)*

*Rachel Zinn, Director, Workforce Data Quality Campaign(WDQC)*

**Discussion Questions:**

What federal agencies other than the U. S. Department of Education collect and maintain postsecondary data?

What partnerships currently exist among federal agencies to share postsecondary data?

What roadblocks have been encountered by policymakers when trying to link federal databases? What road blocks have been overcome?

Specific to workforce data, what linkages exist at the federal level and between the federal government and states?

**12:15PM-1:30PM    Working Lunch with Experts**

*Lunch will provide an opportunity for staff to ask the day's panelists additional questions related to privacy, security and linkages that are of interest to them.*

**1:30PM-2:30PM    Wrap-Up Discussion**

**Facilitators:**

*MaryEllen McGuire, President, PNPI*

*Jared Bass, Federal Director, PNPI*

**Discussion Questions:**

What new information did you learn from today's panels?

What remaining questions do you have about federal postsecondary data systems in general?

What follow-up might you be interested in?

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POSTSECONDARY NATIONAL POLICY INSTITUTE

***Postsecondary Data Primer***

Wednesday, April 19 - Thursday, April 20

Airlie Conference Center

Warrenton, VA

**SEMINAR GOALS**

Introduce staff to, and extend their knowledge of, the postsecondary data sets housed and maintained at the U.S. Department of Education.  
Introduce staff to, and extend their knowledge of, postsecondary data sets housed and maintained outside of the U.S. Department of Education.  
Deepen staff understanding of federal data privacy and security laws, particularly as it relates to student level data.  
Introduce staff to data linkages across federal agencies.  
Lead staff through a data training exercise meant to increase their ability to access and analyze postsecondary data.

**AGENDA**

***Wednesday, April 19***

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*Jason Delisle, Resident Fellow, American Enterprise Institute (AEI)*

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**Discussion Questions:**

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**2:45PM-3:00PM**

**Break**

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**3:00PM-4:00PM**                      **Interactive Data Training & Exercise**

**Facilitators:**

*Mamie Voight, Vice President of Policy Research, IHEP*

*Jared Bass, Federal Director, PNPI*

**4:00PM-4:30PM**                      **Day One Wrap-Up**

**Facilitators:**

*MaryEllen McGuire, President, PNPI*

*Jared Bass, Federal Director, PNPI*

**Discussion Questions:**

After today's panels, are there any questions that are still outstanding?  
Were there any topics not covered today that you had hoped would be?

**4:30PM-5:30PM**                      **Hotel Check-in & Break**

**5:30PM-7:00PM**                      **Dinner**

**Thursday, April 20**

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**8:30AM-9:30AM**                      **Breakfast & Check-out**

**9:30AM-10:45AM**                      **Data Privacy & Security**

**Speakers:**

*Joanna Grama, Director of Cybersecurity and IT GRC Programs, EDUCAUSE*

**Discussion Questions:**

What are the major privacy and security considerations surrounding postsecondary data?  
What is the difference between privacy and security?  
What are the current rules around collecting data and securing data?  
What is the Family Educational Rights and Privacy Act of 1974 (FERPA)?  
What rights do students have with regard to their personal data?  
What responsibilities do IHEs have with regard to collecting, storing and sharing data? What limitations do they face?  
What responsibilities does the Federal Government have with regard to collecting, storing and sharing data?  
What are the tradeoffs between privacy and security?

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**10:45AM-10:55AM**            **Break**

**10:55AM-12:15PM**            **Linkages Across Federal Data Systems**

**Speakers:**

*David Bergeron, Senior Fellow, Center for American Progress (CAP)*

*Rachel Zinn, Director, Workforce Data Quality Campaign(WDQC)*

**Discussion Questions:**

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What roadblocks have been encountered by policymakers when trying to link federal databases? What road blocks have been overcome?

Specific to workforce data, what linkages exist at the federal level and between the federal government and states?

**12:15PM-1:30PM**            **Working Lunch with Experts**

*Lunch will provide an opportunity for staff to ask the day's panelists additional questions related to privacy, security and linkages that are of interest to them.*

**1:30PM-2:30PM**            **Wrap Up Discussion**

**Facilitators:**

*MaryEllen McGuire, President, PNPI*

*Jared Bass, Federal Director, PNPI*

**Discussion Questions:**

What new information did you learn from today's panels?

What remaining questions do you have about federal postsecondary data systems in general?

What follow-up might you be interested in?

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March 9, 2017

Dear Josh Delaney,

We are writing to invite you to participate in the Postsecondary National Policy Institute's (PNPI) seminar on postsecondary data, April 19-20, 2017 in Warrenton, VA.

This seminar is designed to extend your knowledge of the postsecondary data sets housed and maintained within and outside the U.S. Department of Education. It will also deepen your understanding of federal data privacy and security laws, particularly as it relates to student level data. Finally, it will introduce you to data linkages across federal agencies.

PNPI fully complies both with the rules enacted by the United States Senate and with the provisions contained in S.1 (P.L. 110-81) as they relate to privately-funded travel of Congressional staff. Included with this invitation are all the forms necessary for Ethics rules compliance.

**By Monday, March 20, 2017, you must submit the following forms and documents directly with the Ethics Committee in Hart 220:**

- A copy of this PNPI invitation;
- A completed Private Sponsor Travel Certification Form with all attachments, including a Senate invitee list;
- An itinerary and agenda; and
- A completed and signed Employee Pre-Travel Authorization Form.

After receiving the completed travel package, the Ethics Committee will review the package and issue an approval for travel to you or your sponsoring Member. The Ethics Committee advises all Senate employees to maintain copies of all submitted forms for their own records. After the seminar, we will provide you with a post-travel form that you will need to complete and submit to the Ethics Committee.

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**Jared Bass, Federal Director**  
**Postsecondary National Policy Institute (PNPI)**  
[bass@pnpi.org](mailto:bass@pnpi.org)  
**215-285-8347**

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The Senate Member, officer, or employee **MUST** also provide a copy of this form, along with the appropriate travel authorization and reimbursement form, to the Office of Public Records (OPR), Room 232 of the Hart Building, within thirty (30) days after the travel is completed.

☒ The traveler will not be accompanied on the trip by a registered lobbyist or agent of a foreign principal except as provided for by Committee regulations relating to lobbyist accompaniment (see question 9).



9. **USE ONLY IF YOU CHECKED QUESTION 6(B)**

I *certify* that if the sponsor or sponsors retain or employ one or more registered lobbyists or agents of a foreign principal, one of the following scenarios applies:

☐ (A) The trip is for attendance or participation in a one-day event (exclusive of travel time and one overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip.

– OR –

☐ (B) The trip is for attendance or participation in a one-day event (exclusive of travel time and two overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip (see questions 6 and 10).

– OR –

☐ (C) The trip is being sponsored only by an organization or organizations designated under § 501(c)(3) of the Internal Revenue Code of 1986 and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.

10. **USE ONLY IF YOU CHECKED QUESTION 9(B)**

If the trip includes two overnight stays, please explain why the second night is practically required for Senate invitees to participate in the travel:

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11. ☒ An itinerary for the trip is attached to this form. I *certify* that the attached itinerary is a detailed (hour-by-hour), complete, and final itinerary for the trip.

12. Briefly describe the role of each sponsor in organizing and conducting the trip:

PNPI has created the agenda, developed the invitation list, and is managing all event logistics.

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13. Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to that mission:

See attached.

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14. Briefly describe each sponsor's prior history of sponsoring congressional trips:

See attached.

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15. Briefly describe the educational activities performed by each sponsor (other than sponsoring congressional trips):

In addition to multi-day seminars, PNPI sponsors Hill-based briefings for larger Hill audiences and is available to all congressional staff for postsecondary related research support. Our website offers resources including summaries of recent postsecondary reports and primers on higher education issues.

16. Total Expenses for Each Participant:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses
<input checked="" type="checkbox"/> Good Faith estimate	\$53.50 (calculated using Google Maps from U.S. Capitol - round trip)	\$94	\$79	N/A
<input type="checkbox"/> Actual Amounts				

17. State whether a) the trip involves an event that is arranged or organized *without regard* to congressional participation or b) the trip involves an event that is arranged or organized *specifically with regard* to congressional participation:

This trip is arranged and organized specifically with regard to congressional participation.

18. Reason for selecting the location of the event or trip

Airle is located approximately 60 minutes south of DC providing convenient access for congressional staff.

In addition to meeting space, this location offers on-site accommodations.

19. Name and location of hotel or other lodging facility:

Airle Conference Center, 6809 Airle Road, Warrenton, VA 20187

20. Reason(s) for selecting hotel or other lodging facility:

The facility provides both meeting space and overnight lodging on-site.

21. Describe how the daily expenses for lodging, meals, and other expenses provided to trip participants compares to the maximum per diem rates for official Federal Government travel:

Lodging for congressional staff costs \$94/night, the federal per diem. Meal costs are \$46 on day one

(lunch, dinner, incidentals) and \$33 on day two (breakfast, lunch, incidentals), both rates are at the federal per diem rate.

22. Describe the type and class of transportation being provided. Indicate whether coach, business-class or first class transportation will be provided. If first-class fare is being provided, please explain why first-class travel is necessary:

The staff will drive their personal vehicles to the seminar location.

23. ☒ I represent that the travel expenses that will be paid for or reimbursed to Senate invitees do not include expenditures for recreational activities, alcohol, or entertainment (other than entertainment provided to all attendees as an integral part of the event, as permissible under Senate Rule 35).

24. List any entertainment that will be provided to, paid for, or reimbursed to Senate invitees and explain why the entertainment is an integral part of the event:

N/A

25. I hereby *certify* that the information contained herein is true, complete and correct. (You must include the completed signature block below for each travel sponsor.):

Signature of Travel Sponsor: Micah E. M

Name and Title: MaryEllen McGuire, President

Name of Organization: Postsecondary National Policy Institute (PNPI)

Address: 718 7th Street NW, Floor 2, Washington, DC 20001

Telephone Number: 202-841-7359

**Fax Number:**

E-mail Address: mcguire@pnpi.org

**ATTACHMENT:**  
**Senate Private Sponsor Travel Certification Form**

**2. Description of the Trip:**

This seminar is designed to introduce staff to, and extend their knowledge of, the postsecondary data sets housed and maintained at the U.S. Department of Education and postsecondary data sets housed and maintained outside of the U.S. Department of Education. We will also deepen staff understanding of federal data privacy and security laws, particularly as it relates to postsecondary data, and introduce staff to data linkages across federal agencies. Finally, we plan to lead staff through a data training exercise meant to increase their ability to access and analyze postsecondary data.

A detailed agenda is attached.

**5. Name and title of Senate invitees:**

**Katie Brown**  
Legislative Assistant  
Senator Collins

**Kara Marchione**  
Director of Education Policy  
Senator Murray

**Lauren Davies**  
Education Policy Advisor  
Senator Alexander

**Bryce McKibben**  
Policy Advisor  
Senator Murray

**Josh Delaney**  
Legislative Assistant  
Senator Warren

**Karishma Merchant**  
Legislative Assistant  
Senator Kaine

**Andrew LaCasse**  
Education Policy Advisor  
Senator Alexander

**Bob Moran**  
Education Policy Advisor  
Senator Alexander

All staff were invited due to their employment with a Member who sits on the Senate HELP Committee.

**13. Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to that mission:**

PNPI provides professional development to Congressional staff who work on higher education issues. This seminar is designed to introduce staff to, and extend their knowledge of, the postsecondary data sets housed and maintained at the U.S. Department of Education and postsecondary data sets housed and maintained outside of the U.S. Department of Education. We will also deepen staff understanding of federal data privacy

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## EMPLOYEE PRE-TRAVEL AUTHORIZATION

**Pre-Travel Filing Instructions:** Complete and submit this form at least 30 days prior to the travel departure date to the Select Committee on Ethics in SH-220. Incomplete and late travel submissions will not be considered or approved. This form must be typed and is available as a fillable PDF on the Committee's website at [ethics.senate.gov](https://ethics.senate.gov). Retain a copy of your entire pre-travel submission for your required post-travel disclosure.

**Josh Delaney**

Name of Traveler: \_\_\_\_\_

## Senator Warren

Employing Office/Committee: \_\_\_\_\_

Private Sponsor(s) (list all): Postsecondary National Policy Institute (PNPI)

Travel date(s): April 19-20, 2017

**Note: If you plan to extend the trip for any reason you must notify the Committee.**

Destination(s): Warrenton, VA

**Explain how this trip is specifically connected to the traveler's official or representational duties:**

The employee is Senator Elizabeth Warren's education policy advisor, and he advises the Senator on matters related to federal postsecondary data. This seminar will deepen staff knowledge of federal postsecondary data and data security.

Name of accompanying family member (if any): \_\_\_\_\_

Relationship to Employee: ☐ Spouse ☐ Child

**I certify that the information contained in this form is true, complete and correct to the best of my knowledge:**

3/20/17  
(Date)

*J. Delaney*  
(Signature of Employee)

TO BE COMPLETED BY SUPERVISING SENATOR/OFFICER (President of the Senate, Secretary of the Senate, Sergeant at Arms, Secretary for the Majority, Secretary for the Minority, and Chaplain):

I, ELIZABETH WARREN hereby authorize Josh Delaney  
(Print Senator's/Officer's Name) (Print Traveler's Name)

an employee under my direct supervision, to accept payment or reimbursement for necessary transportation, lodging, and related expenses for travel to the event described above. I have determined that this travel is in connection with his or her duties as a Senate employee or an officeholder, and will not create the appearance that he or she is using public office for private gain.

I have also determined that the attendance of the employee's spouse or child is appropriate to assist in the representation of the Senate. (signify "yes" by checking box) ☐

3/20/17  
(Date)

  
(Signature of Supervising Senator/Officer)